



Bracknell Forest Council

# Finance career pathway handbook



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# Introduction

The handbook is a guide for planning your learning and career development options. The overall objective is to provide you with high quality learning opportunities to help you develop your skills, capability, and talent across the organisation.

We encourage you to use the handbook throughout your career with us. It should be complementary to any statutory and mandatory guidance aligned to your profession and any continuous professional development (CPD) requirements.



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# Finance career pathways

## **What is a career pathway?**

A career pathway is simply the route you take to achieve your career progression and goals.

These help you to think about the opportunities within your current pathway and how you can progress to more senior pathways by developing your skills, knowledge and experience.

## **Who is it for?**

Everyone should have a career pathway that is used regularly in development and performance management conversations with your line manager.

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# Finance career pathways

## Deciding your career pathway

- A career pathway can help you transition from one role to another within the service/ department/organisation
- Setting out your career pathway provides you with a road map from where you are now to where you want to be and provides structure to your journey

## Your career pathway

Things to consider when developing your career path:

- What are some of the council's values and behaviours you use in your current role?
- What are your strengths?
- How much experience do you have?
- What technical skills do you possess?



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# Your career development

## Step up

Step-up can also be about gaining greater expertise in your current role or in another service or department, it isn't always about promotion.

## Step sideways

Whatever your aspiration or ambition, there may be opportunities at your current level in another team.

Working in different parts of the organisation will extend your knowledge and experience.

## Settled

If you are happy in your current role maybe you would like to consider other options to develop yourself.

Become a first aider, a mental health first aider or equality ally.



# Finance teams and roles

	Accountancy and finance support	Finance and business services
<b>Pathway 1</b>	Accountancy professional apprentice (entry level) Assistant accountant apprentice level 3 finance officer	Accountancy assistant Accounts payable assistant Accounts payable officer Accounts receivable officer Social care finance assistant Social care finance officer
<b>Pathway 2</b>	Accountancy professional apprentice (level 7) Assistant accountant apprentice level 4 School funding officer Senior accountancy officer	Accountancy officer Senior accounts payable officer Exchequer team leader Accounts receivable team leader
<b>Pathway 3</b>	Accountancy professional apprentice (Post qualification experienced) Capital and treasury manager	Head of exchequer services
<b>Pathway 4</b>	Deputy finance business partner Finance business partner	

## Finance teams career pathway examples

	Accountancy and finance support	Finance and business services
<b>Pathway 1</b>		
<b>Pathway 2</b>		
<b>Pathway 3</b>		
<b>Pathway 4</b>		

# Accountancy and finance support

- Production of the statutory annual statement of accounts
- Production of annual budget
- Budget monitoring support and advice
- System reconciliations
- Schools funding and budgets
- Guidance and support to school bursars

*Accounts and financial statements*



*Accrual Basis Accounting*

# Accountancy and finance support - Pathway 1

Tips	Key Skills	Key responsibilities
<ul style="list-style-type: none"><li>• This is very much a learning phase of your career and an opportunity to develop a firm foundation for your future career in finance</li><li>• Consider shadowing opportunities with experienced colleagues within your team</li><li>• Continue to develop your knowledge base</li><li>• Work to embed that knowledge base in your practice</li><li>• Bring new approaches and learning to your team and share your newly gained insights</li><li>• Ensure that you get the most out of your supervision and that you discuss your career ambitions with your supervisor</li></ul>	<ul style="list-style-type: none"><li>• Relevant experience of finance processes and other financial reconciliations</li><li>• Ability to achieve objectives through planning, monitoring and re-appraisal</li><li>• Ability to communicate clearly with officers of all levels in the council</li><li>• Willing to respond to requests, open to new ideas and being innovative</li></ul>	<ul style="list-style-type: none"><li>• Assist with the financial services and general support. This will involve reporting, creating journals, budget movements, coding corrections and reconciliations</li><li>• Investigate general financial queries (including supporting the year-end closure and audit requests) and assist in maintaining manual and computerised records including Imprest accounts</li><li>• Upload school budgets ensuring figures are accurate and reconcile to agreed control totals</li></ul>



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# Accountancy and finance support - Pathway 2

Tips	Key Skills	Key responsibilities
<ul style="list-style-type: none"><li>• Consider shadowing some colleagues in other teams and services</li><li>• Share good practice examples in your team</li><li>• Look to take on a supervisory role and to support apprentices</li><li>• Think about becoming a champion for a specific area of focus within the team</li></ul>	<ul style="list-style-type: none"><li>• AAT level 4</li><li>• Strong analytical skills including ability to identify complex relationships between financial and non-financial data and use to support decision making</li><li>• Significant experience in a finance department of a local authority or public body</li><li>• Interpretation of the effects of rules, regulations and accounting best practice on the financial policies and procedures adopted by the council and make appropriate recommendations</li></ul>	<ul style="list-style-type: none"><li>• Actively involved in supporting the council's budget preparation and budget monitoring arrangements, being the main point of contact in finance for a number of budget managers</li><li>• Prepare government returns, statistics and other financial information</li><li>• Assist in the production of the council's statutory annual accounts, related statutory returns and other financial information</li><li>• Play an active role in risk assessing budgets across the council</li></ul>

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# Accountancy and finance support - Pathway 3

Tips	Key Skills	Key responsibilities
<ul style="list-style-type: none"><li>• Develop your strategic awareness and thinking</li><li>• Look to participate in projects and groups that are focused on practice and service developments</li><li>• Bring innovative ways of working to the team and your service areas</li><li>• Consider aspects such as integrated working and how gains can be made</li></ul>	<ul style="list-style-type: none"><li>• CCAB qualified</li><li>• In depth knowledge of local authority accounting guidance and practice</li><li>• Understand, interpret, and apply the legislation, standards and principles that apply to the role</li><li>• Influence the impact of business decisions on relevant and affected communities based on an appreciation of the council and the environment in which it operates</li></ul>	<ul style="list-style-type: none"><li>• Work successfully on multiple projects and tasks simultaneously ensuring they are timely and achieve high standards of output</li><li>• Contribute to financial modelling of new services or changes to existing services, work with business area and/or third parties to enhance financial and business performance</li><li>• Responsible for the financial input to budgetary control arrangements across the council and for supporting the finance business partners in their roles to ensure realistic budgets, business plans, and performance indicators are in place across the council</li></ul>

# Accountancy and finance support - Pathway 4

Tips	Key Skills	Key responsibilities
<ul style="list-style-type: none"> <li>• Consider studying for Certificate/Diploma in management and leadership</li> <li>• Look to participate in SOLACE Springboard programme</li> <li>• Set up an action learning set for you and your peers</li> </ul>	<ul style="list-style-type: none"> <li>• CCAB qualified</li> <li>• In depth knowledge of local authority accounting guidance and practice</li> <li>• Credible strategic advisor</li> <li>• Substantial experience of working in a finance section in a public sector organisation at a senior level</li> <li>• Maintains a high standard of compliance with the council's financial policies and procedures included with the council's constitution</li> </ul>	<ul style="list-style-type: none"> <li>• Involved in producing the council's statutory annual accounts</li> <li>• To be the lead financial advisor to an executive director, members, assistant directors and external groups</li> <li>• Responsible for planning and leading complex projects for a directorate</li> <li>• Assess and document financial implications for reports covering a directorate's services</li> <li>• To ensure all directorate services comply with statutory financial regulations</li> <li>• Provide strategic financial input to directorate and corporate plans and policies</li> </ul>

# Finance and business services

- Accounts payable and accounts receivable
- Banking and treasury management
- Manage the compliance and interpretation of the Construction Industry Scheme (CIS) regulations
- VAT returns
- Purchase cards



# Finance and business services

## - Pathway 1

Tips	Key Skills	Key responsibilities
<ul style="list-style-type: none"> <li>• This is very much a learning phase of your career and an opportunity to develop a firm foundation for your future career in finance</li> <li>• Consider shadowing opportunities with experienced colleagues within your team</li> <li>• Continue to develop your knowledge base</li> <li>• Work to embed that knowledge base in your practice</li> <li>• Bring new approaches and learning to your team and share your newly gained insights</li> <li>• Ensure that you get the most out of your supervision and that you discuss your career ambitions with your supervisor</li> </ul>	<ul style="list-style-type: none"> <li>• Experience of communicating clearly with people of all levels, external callers and contractors. Using telephone, written and face to face contact</li> <li>• Good ICT skills including the use of a spreadsheet and word processing</li> <li>• Ability to organise workload and work to with a good attention to detail</li> </ul>	<ul style="list-style-type: none"> <li>• Processing of adult social care invoices through the adult social care finance system (ContrOCC)</li> <li>• Registration of invoices into the council's financial system (Agresso)</li> <li>• Raise invoices, credit notes and reminders to the council's customers in a timely manner</li> <li>• Section 106 financing for capital</li> </ul>

# Finance and business services

## - Pathway 2

Tips	Key Skills	Key responsibilities
<ul style="list-style-type: none"> <li>• Consider shadowing some colleagues in other teams and services</li> <li>• Share good practice examples in your team</li> <li>• Look to take on a supervisory role and to support apprentices</li> <li>• Think about becoming a champion for a specific area of focus within the team</li> </ul>	<ul style="list-style-type: none"> <li>• AAT level 4</li> <li>• Ability to communicate clearly with officers of all levels in the council, using telephone, written and face to face contact</li> <li>• Good ICT skills including the use of a spreadsheet and word processing</li> <li>• Familiarity with a complex financial package</li> <li>• Ability to achieve objectives through planning, monitoring and re-appraisal</li> </ul>	<ul style="list-style-type: none"> <li>• Daily processing of income and expenditure entries for the council's bank accounts and debtor batch receipts</li> <li>• Reduce the level of outstanding debts across the council by ensuring effective processes are in place and actions taken so all debts are rigorously pursued</li> <li>• Assist with the administration and recording of construction industry scheme (CIS) invoices and payments</li> <li>• Manage all personal expenses claims for payment following budgetary authorisation, ensuring VAT coding is correct and posting into ledger</li> </ul>

# Finance and business services

## - Pathway 3

Tips	Key Skills	Key responsibilities
<ul style="list-style-type: none"> <li>• Develop your strategic awareness and thinking</li> <li>• Look to participate in projects and groups that are focused on practice and service developments</li> <li>• Bring innovative ways of working to the team and your service areas</li> <li>• Consider aspects such as integrated working and how gains can be made</li> </ul>	<ul style="list-style-type: none"> <li>• AAT level 4 or CCAB qualified</li> <li>• Experience of managing and developing staff with an ability to lead, motivate and develop a team</li> <li>• Ability to undertake and progress business process re-engineering</li> <li>• Ability to achieve objectives through planning, monitoring and re-appraisal</li> </ul>	<ul style="list-style-type: none"> <li>• Develop and maintain a strategy for the efficient requisitioning, ordering and payment of goods and services across the council and implement guidelines and effective procedures to achieve this</li> <li>• Manage compliance and interpretation of the construction industry scheme, providing advice and support to officers</li> <li>• Lead on the training, development and implementation of the accounts payable and receivable modules of the financial system and providing advice and support to other officers</li> <li>• To ensure that the banking arrangements support the needs of the organisation, reconciliations are up to date and feeder systems to Agresso are accurately interfaced in a timely manner</li> </ul>

# Your career development - apprenticeships

Can I undertake an apprenticeship?	Benefits	Next steps
<ul style="list-style-type: none"><li>• Apprenticeships are available to both new and existing employees</li><li>• For existing employees, apprenticeships are part of the council developing careers programme</li><li>• Apprenticeships are available at the same or higher level than a qualification you already hold, or lower as long as:<ul style="list-style-type: none"><li>• it allows you to gain substantive new skills</li><li>• you can evidence that the content of the training is different from any prior qualification or previous apprenticeship</li></ul></li></ul>	<ul style="list-style-type: none"><li>• Apprenticeships are a good opportunity to 'grow our own' future workforce</li><li>• By developing our staff with a clear career pathway, from levels 2 to level 7, we can develop a highly skilled, multi-talented workforce</li><li>• While working for us, apprentices can develop new talent. This benefits the council while making sure the apprentice gathers the relevant evidence and skills needed to complete their qualification</li><li>• Having an apprentice in the team can open new challenges and opportunities for others. Existing staff can gain valuable experience by taking on coaching and mentoring roles, developing new skills and experience of their own</li></ul>	<ul style="list-style-type: none"><li>• If you are interested in applying to take part in an apprenticeship, talk to your manager and then complete an <a href="#">expression of interest form</a> or contact Janine Watkins to discuss the options available</li></ul>


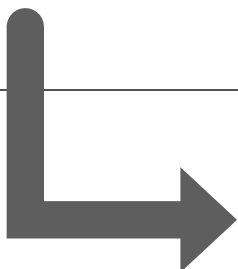


# Your career development - finance apprenticeship routes

This occupational progression map shows technical occupations that have transferable knowledge and skills.

In this map, the focused occupation is highlighted in yellow.

It is anticipated that individuals would be required to undertake further learning or training to progress to and from occupations.

Technical occupations Levels 2-3	Higher technical occupations Levels 4-5	Professional occupations levels Levels 6-7
Assistant Accountant - Level 3  Business administrator - Level 3		
	Internal audit practitioner - Level 4  Professional accounting or taxation technician - Accounting - Level 4  Professional accounting or taxation technician - Tax Level 4	
		Chartered Manager - Level 6  Senior compliance and risk specialist - Level 6  Accountancy or taxation pro- fessional - Level 7

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# Performance management and supervision

We are committed to ensuring every member of staff has clear performance objectives and learning plans.

It is important to ensure each team member has clear plans and goals, that the appropriate professional supervision regularly takes place and is recorded, and line managers ensure individuals are well and coping with the demands of their role. Regular supervision is a way of formally or informally reviewing progress, encouraging learning and reflections and checking individuals have the support and tools to deliver their best work.

You will be invited to attend an annual appraisal conversation with your line manager.

The purpose of this meeting:

- a two-way conversation and to discuss performance objectives (the things you will do over the coming 12 months)
- the council behaviours and how you will demonstrate these in the work you do (how you will work over the coming 12 months) and learning and support

The learning and support section is an opportunity for you to highlight the tools, learning and support you will need to do your work well.

Whilst the main appraisal conversation happens once a year, the purpose of supervision and ongoing 1:1s should be to regularly check in on how you are progressing and highlight any issues you are encountering.

As part of the appraisal conversation, you and your line manager can record the key points from the conversation using the short [performance appraisal form](#), this can be found on the council's intranet.

As a manager, leader or supervisor, all the appropriate information on carrying out performance appraisals can be found on the [Bracknell Forest Manager Hub](#) on the intranet.

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# Learning and development

The new [Workforce and Organisational Development Strategy 2021-2024](#) is supported by the Learning and Development Strategy and Plan 2021-2024.

Learning and development is pivotal to how we develop our existing workforce and clearly demonstrates the council's commitment to providing a robust and ambitious programme of learning for all areas of the council.

A key focus is to create a learning culture in line with the council's values: inclusive, ambitious and always learning.

The council values learning in all its forms, both formal and informal, and recognises that this can be provided in a blended learning offer.

There are a variety of activities that can be delivered virtually or in person, learning from naturally occurring activities:

- such as networking and shadowing, through reading and discussing topics with other colleagues
- coaching and mentoring
- attending conferences and completing eLearning

The [learning and development](#) opportunities are accessible on the intranet. This is a summary of all learning available for the whole organisation, including finance and the relevant pathways.



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# Learning and development



The eLearning Zone offers opportunities to continue personal development, refresh existing skills, find out ways to look after yourself, or perhaps get quick advice on how to deal with a problem workplace situation. You will notice on your desktop there is an icon that looks like an internet symbol, it is called the eLearning Zone. On the eLearning Zone you can search training and courses by topic or event dates.



The learning and development team produces an annual calendar of all training activities via the intranet. Once you have identified the course you would like to attend, go into the iWork system and book yourself onto the training from there. This will ensure that your attendance is recorded at the event and your learning record is updated.



Often colleagues who have many years' experiences are willing to coach and mentor others to develop their skills and knowledge. Coaching is an approach that provides a safe space for an individual to think about their professional goals and make solid plans to achieve them.

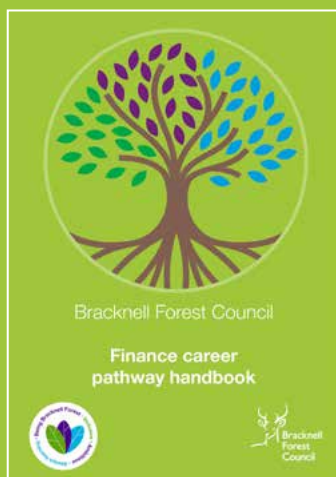
Mentoring is much more directive in terms of helping individuals to achieve their goals, drawing on the mentor's experience and skills. To find out more about coaching and mentoring opportunities, please visit our intranet pages.



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For more information about our Academy Model career pathways please visit our website <https://www.bracknell-forest.gov.uk/jobs/academy-model-career-development> or if you have any questions you can email our drop box [academy.model@bracknell-forest.gov.uk](mailto:academy.model@bracknell-forest.gov.uk).

For apprenticeship queries please email the drop box [Apprenticeships@bracknell-forest.gov.uk](mailto:Apprenticeships@bracknell-forest.gov.uk)



If you need a reasonable adjustment to communicate with us, please call 01344 352000 or email: [customer.services@bracknell-forest.gov.uk](mailto:customer.services@bracknell-forest.gov.uk).