London Borough of Redbridge

Resources
Finance

Financial Planning Accountant

Job Description and Person Specification

August 2026

Job Description

Job Title:	Financial Planning Accountant
Department:	Finance
Function:	Service Financial Management
Team:	Operational Finance
Post number:	
Grade:	14
Hours/weeks: *E.g. 36 hours/52.14 weeks*	36
Base location:	Lynton House
Reports to: *Job title*	Financial Strategy Manager
Responsible for: *Job titles of direct reports*	Apprentices or Graduate Trainees as assigned

Role purpose and role dimensions: *Overview of the job*	The post holder will work with the Financial Strategy Manager and wider finance team to deliver on cross-cutting, strategic and statutory accounting requirements for the Council • Providing specialist financial planning, modelling and analysis to support the production of the Councils Budget, Medium Term Financial Strategy and related reports. • Lead on the production of key appendices to the Council Budget, Medium Term Financial Strategy and related reports • Support the production of monthly budget monitoring reports for the Council as a whole • Lead on the production of key appendices to the budget monitoring reports. • Lead on the production of statutory returns including the RA, RO and QRU, as well as other non-statutory statistical returns • Ensure that controls in relation to the Council's budget framework are operating effectively, including related reconciliations to ensure the integrity and accuracy of the Council's agreed budget throughout the year. • Produce monitoring information for the Council's corporate budgets • Monitor the Council's overall reserves position, including reconciliation of corporate reserves and compiling information on reserves managed elsewhere within the finance team • Provide support and challenge to other members of the finance team in relation to the above items • Provide a professional Finance service through day to day supervision and team development activity, the post holder will maintain awareness and knowledge of relevant legislation, financial reporting standards, best practice and new developments. • Supporting the provision of high quality financial services to senior stakeholders in the allocated service area, in accordance within the Council's vision and values • To support the delivery of the Council's statement of accounts and associated financial returns. Supporting the delivery of the requirements of the external audit team and ensuring that all required working papers and evidence are provided in a timely manner. • To support the development and evaluation of budget options • Provide a key contribution towards ensuring that team members are adequately trained to meet the requirements of the service and the organisation • Represent the Finance Service on internal meetings, promoting the interests of the Finance Service function and ensuring that the Council's priorities are taken into account. • Promote and develop a culture that supports a Self Service approach to service delivery. • Any other duties that may reasonably be considered to be within the scope of this post.
Key external contacts: *Organisations*	• MHCLG • External Auditors • London Councils • Partner Organisations e.g. CCGs, NELFT, Police, Schools • Voluntary Sector Groups
Key internal contacts: *Job titles or groups of staff*	• Finance Team
Financial dimensions: *Budgetary responsibility & amount. Equipment, cash, property etc. for which employee is responsible.*	There is no direct financial responsibility The postholder will have responsibility for maintaining and reconciling the Council's overall approved budget in excess of £1bn, and for monitoring the Council's corporate budgets and reserves

Key areas for decision making:	The postholder will provide professional advice and work closely with the Financial Strategy Manager in advising on all aspects of financial management, producing and co-ordinating key parts of the budgeting and monitoring process taking the lead role on elements of this. This will have far reaching financial and wider implications, covering aspects including: - • financial forecasting and planning • statutory accounting, including interpretation of relevant statute and regulation. • business planning; • corporate financing and planning; • transformation and the financial implications of alternative service delivery models; • service planning, horizon forecasting; • advice and signposting across the Resources directorate.
Other considerations: *E.g. working patterns*	Normal office hours But working flexibly and in different locations, including working from home. With an expectation to adjust working patterns according to service needs

Key accountabilities and result areas:	**Key elements:**
Provision of strategic financial advice	**This will involve:** • Financial modelling • Enabling enhanced commercialisation and awareness, developing opportunities • Pre-empting risks, devising and implementing mitigations and solutions • Ensuring the financial implications for formal reports are robust and fully inform service and corporate decision making

Management Accounting	The postholder will be responsible for ensuring that key financial processes are being delivered correctly, continue to be fit for purpose and meet all the needs of the Council. They will be specifically required to: • Play an active role in the design and development of the information provided to the Council for the purpose of financial management, monitoring and control - with an emphasis on constantly improving the quality and customer focus of this information. • Producing key elements of monthly budget monitoring reports, in addition to compiling and contributing to the overall corporate budget monitoring reports for consideration by senior managers and Members. • Contribute to meeting the training needs of all managers and their staff in the use of financial systems and reports. • Recommend developments in systems and procedures that enable effective budgetary control, ensuring that variations and emerging financial pressures are drawn to the attention of managers, with options for their resolution, and incorporated into corporate reports. • Represent the Finance Service Area at meetings with managers, providing advice on the financial implications of policy and delivery issues. • Provide financial analysis and advice on the financial implications of matters under consideration by the Council, providing advice on the financial and resource implications of proposals for inclusion in reports to Committees, escalating to the Financial Strategy Manger as appropriate. • Ensure that external influences, such as changes demand that impact on the Council are evaluated and their impact is reflected in financial plans and work programmes. • Assist in identifying, evaluating and securing mainstream and alternative sources of funding.
Financial Planning	**This will involve:** • Assisting with the writing of the annual budget and council tax setting report • Leading on the production of key appendices to the annual budget and council tax setting report • Budget modelling to determine financial impact of future service demands, changes in legislation and other factors determining resource requirements • Analysing and interpreting key financial information e.g. settlement and grant allocations • Keep abreast of developments in Local Government Finance policy and practice, in order to provide advice on a wide range of complex issues. • Compile key elements of the the monthly corporate monitoring reports for the Council • Develop and maintain the accounting records necessary to comply with legislative requirements and best professional practice, and to meet the information requirements of managers.

Medium Term Financial Strategy	**This will involve:** • Taking a hands-on role in preparing Revenue and Capital budgets as part of the Resource Allocation procedures of the Medium Term Financial Strategy (MTFS). • Maintaining detailed financial forecasts, assumptions, financial models and supporting analysis underpinning the MTFS • Preparing information for the compilation of corporate reports together with appropriate explanatory information. • Supporting the Financial Strategy Manger as directed, including with the support of service departments in the development and challenge of savings and other budget proposals and identification and calculation of the impact of major financial pressures on services which will affect the Council's overall financial position.
Customer Focus	**This will involve:** • Escalation and customer liaison point for finance service • Supporting the delivery of key stakeholder financial training needs • Determining customer needs and shaping the service as appropriate within resource constraints • Promoting a culture which empowers budget holders and supports the delivery of value for money services and knowledge of key cost drivers
Other	**This will involve:** • Representing the LB of Redbridge at where appropriate at external forums and providing direct support to the Finance lead in relevant strategic partnerships • Supporting the implementation of complex strategic financial policies and procedures • Assisting in relevant internal audit processes and ensuring that recommendations are implemented as appropriate
General accountabilities and responsibilities	
Green Statement	**This will involve:** ▪ Seeking opportunities for contributing to sustainable development of the borough, in accordance with the Council's commitment to making Redbridge a cleaner, greener place to live. In particular, demonstrating good environmental practice (such as energy efficiency, use of sustainable materials, sustainable transport, recycling and waste reduction) in your job.
Data Protection/Confidentiality	**This will involve:** ▪ Complying with the Data Protection Act 1998 – treating all information acquired through your employment, both formally and informally, in strict confidence and in accordance with Caldicott principles. ▪ Complying with the Code of Conduct, other practice guidelines and the rules and protocols defining employees' access to and use of the Council's databases and systems. Any breaches could result in disciplinary measures. ▪ Maintaining client records and archive systems in accordance with departmental procedure, policy and statutory requirements.

Conduct and Whistleblowing	**This will involve:** ▪ Complying with the requirements of the Code of Conduct and maintaining high standards of personal conduct, honesty and integrity. You have a duty to raise any impropriety or breach of procedure to the appropriate level of management. Employees making such disclosures (whistleblowing) are protected and may make them without fear of recrimination.
Safer Working	**This will involve:** ▪ Commitment to safeguarding and promoting the welfare of children, young people and vulnerable adults. Where you work in such a post the Council will require a DBS Disclosure check and references will be taken up prior to interview.
Equalities	**This will involve:** ▪ Complying with the Council's strong commitment to achieving equality of opportunity and outcomes in its services to the community and in the employment of people. You are expected to understand, comply with and promote Council policies in your work, to undertake any appropriate training and to challenge any prejudice and discrimination.
Customer Care	**This will involve:** ▪ Complying with corporate and service area customer service standards and promoting the development of high quality, individualised and customer-led services.
Health and Safety	**This will involve:** ▪ Being responsible for your own Health & Safety, as well as that of colleagues, service users and the public. Employees should co-operate with management, follow established systems of work, use protective equipment where necessary and report defectives and hazards to management.
To contribute as an effective and collaborative member of the team	**This will involve:** ▪ Taking responsibility for continuing self-development and participating in training and development activities. ▪ Participating in the ongoing development, implementation and monitoring of the service plans. ▪ Supporting and contributing to value for money, service efficiencies and improvements.
Flexibility	**This will involve:** ▪ The above-mentioned duties are neither exclusive nor exhaustive. From time to time you may be required to undertake responsibilities outside the normal remit of your Job Description as required by the line manager, and are broadly within your the grading level and competence.

Person Specification

Job Title:	Financial Planning Accountant		
	Method of candidate assessment: A = Application form, I = Interview, T = Test. Weighting: 3 = most important, 1 = least important	**A - I – T**	Weighting
Minimum education/ qualifications:	CCAB or CIMA qualified or similar demonstrable experience at a similar level	A/I	3
	Ongoing evidence of Continuing Professional Development	A/I	3
Minimum experience/ knowledge/ skills:	Significant experience of financial management in a large and complex organisation	A/I	3
	Experience of working with complex financial models	A/I/T	3
	Experience of process review and improvement	A/I	3
	Understanding of the local authority legislative framework – specifically in relation to financial reporting and accounting	A/I/T	3
	Experience and knowledge of the local authority closure of accounts process including the compliance framework relating to the Code of Practice on Local Authority Accounting	A/I	3
	Experience of staff supervision, developing junior colleagues and team building	A/I	2
	Understanding of the financial risks and implications of commercialisation in the public sector	A/I	2
	Experience of analysing Government funding announcements, grant allocations and legislative or policy changes and translating these into financial forecasts	A/I	3
Minimum behaviours: Customer service	Ability to deliver a customer focussed service	A/I	3
	Responsive to customer need, implementing feedback mechanisms	A/I	3
	Ability to manage conflicting deadlines and customer expectations	A/I/T	3
	Ability to maintain excellent professional relationships, but challenge when appropriate	A/I	3
Communicating and influencing others	Ability to influence and negotiate	A/I	2
	Ability to communicate effectively and appropriately through all mediums	A/I/T	3
	Ability to present complex information effectively to all audiences	A/I/T	3

Working together	To work in partnership with service managers	A/I	3
	To work seamlessly with other members of the finance team and wider resources directorate	A/I	3
	To participate in cross functional project teams, within the Council and with wider partners	A/I	2
Analysis and judgement	Ability to analyse and interpret complex financial information	A/I	3
	Ability to use a wide range of financial and non-financial information in decision making	I	3
	Ability to be proactive and pre-emptive in decision making	I	2
Driving improvement	Ability to ensure continuous process, service and customer focus improvement	A/I	3
	Ability to work with wider teams to maximise synergy and deliver wider corporate improvement	A/I	3
	Ability to contribute to organisational change	A/I/T	3
Adaptability	Able to respond to changing customer requirements	A/I	2
	Ability to manage and adapt to constantly changing priorities	A/I	2